

Category: WORKSPACE INSIGHTS	Document Type: Quick Guide	Author: Content Team	Software Version: 9.5	Updated: 10/30/2025
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INSIGHTS

Workspace Insights empowers school nutrition leaders to monitor program performance in real time across SchoolCafé. By consolidating critical **Key Performance Indicators (KPIs)** into a single dashboard, Insights provides a clear and actionable view of participation, revenue, menu performance, and operational efficiency.

To access the Insights module, navigate to **Insights > Workspace Insights**.

SCHOOLCAFÉ SETUP

Role permissions must be updated for all users requiring access to Insights. We recommend Central Office Staff have initial access for review. Additional roles, such as site managers, may then be enabled if desired.

Navigate to **System > Management > Roles and Permissions**

On the **Roles and Permissions** page

1. Click the **Edit** icon for the desired role
Click + NEW if the desired role is not available.

System > Management

ADMIN ROLES
+ NEW

Roles and Permissions

Role ↑	Description	Users	Action (s)
_____ ▾	_____ ▾	_____ ▾	
Cafeteria Manager	Cafeteria Manager	16	✎ ⋮
Cashier	Cashier	20	✎ ⋮
Central Office Staff	Central Office	13	✎ ⋮

2. Click the **Insights Dashboard** toggle
Click the arrow next to the module name to expand the permissions for that module.
3. Click **SAVE** to retain changes
A success message displays.
Repeat this process for roles that should have access to Insights.

Platform		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<div style="display: flex; align-items: center;"> ▼ Insights <div style="flex-grow: 1;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Module <div style="margin-left: 10px;"> <input checked="" type="checkbox"/> </div> </div> <div style="margin-top: 5px;"> <input checked="" type="checkbox"/> </div> </div> </div>					
<div style="display: flex; align-items: center;"> Insights Dashboard <div style="flex-grow: 1;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Page <div style="margin-left: 10px;"> <input checked="" type="checkbox"/> </div> </div> <div style="margin-top: 5px;"> <input checked="" type="checkbox"/> </div> </div> </div>					
<div style="display: flex; align-items: center;"> > Reports <div style="flex-grow: 1;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Module <div style="margin-left: 10px;"> <input type="checkbox"/> </div> </div> <div style="margin-top: 5px;"> <input type="checkbox"/> </div> </div> </div>					
<div style="display: flex; align-items: center;"> > System <div style="flex-grow: 1;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Module <div style="margin-left: 10px;"> <input type="checkbox"/> </div> </div> <div style="margin-top: 5px;"> <input type="checkbox"/> </div> </div> </div>					
<div style="display: flex; align-items: center;"> > Workspace <div style="flex-grow: 1;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Module <div style="margin-left: 10px;"> <input type="checkbox"/> </div> </div> <div style="margin-top: 5px;"> <input type="checkbox"/> </div> </div> </div>					

CANCEL
3 SAVE

Once the permissions are updated, users with the assigned roles will see the Workspace Insights link in SchoolCafé and can begin using the dashboard.

The screenshot shows the 'Workspace Dashboard' interface. On the left sidebar, under the 'Insights' section, the 'Workspace Insights' link is highlighted with a red box. The main content area is titled 'Dashboard' and includes sections for 'INBOX & MESSAGES' (with a sub-section 'INBOX 0') and 'My Tasks' (with a sub-section 'MY TASKS 0'). Both sections contain placeholder text and icons indicating where messages and tasks will appear.

INSIGHTS SETUP

- a. **Configure Benchmarks:** This is recommended but not required to see the Key Performance Indicators (KPIs).
- b. **Configure KPIs:** This allows users to customize which cards display and in what order.
- c. **Dark Mode:** This changes the appearance from light to dark. This is located in the user's preferences.

Workspace Acme School District

Insights Today All Schools

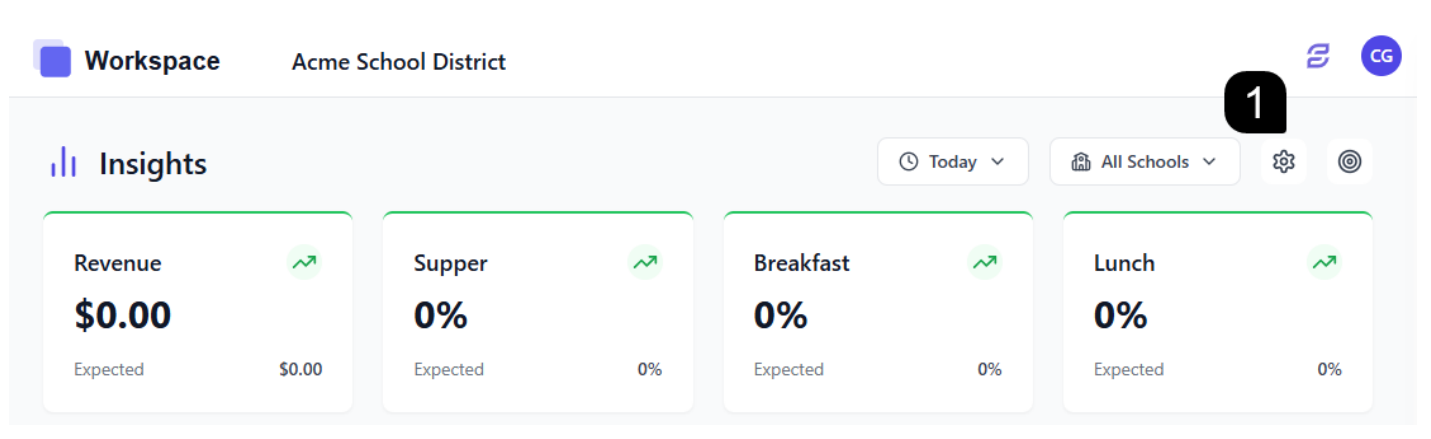
KPI	Current Value	Expected Value
Revenue	\$0.00	\$0.00
Supper	0%	0%
Breakfast	0%	0%
Lunch	0%	0%
Snack	0%	0%
Waste	\$0.00	\$0.00
Meals	0	0
MEQs	0	0
Eco Dis	1%	0%

Workspace Insights is designed to be flexible, allowing districts to tailor the dashboard to their specific needs. Setup involves two quick steps: Configuring Key Performance Indicators (KPIs) cards and Setting Benchmarks.

Step 1: Configure Key Performance Indicators (KPIs)

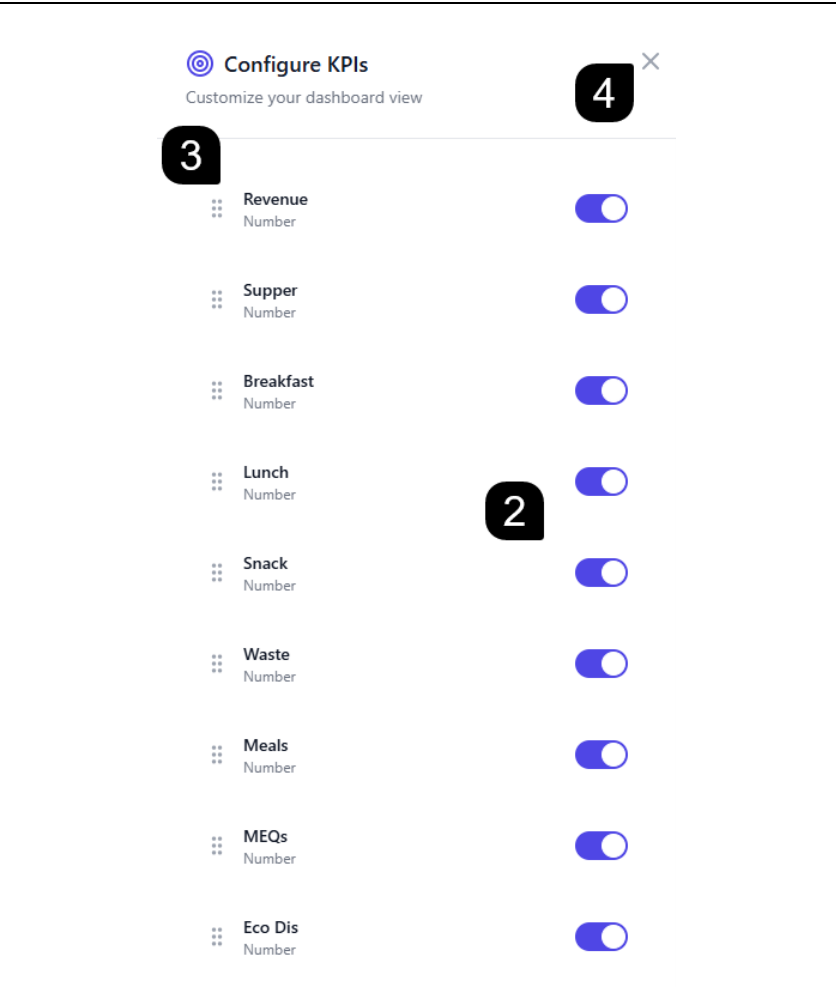
The Configure KPIs drawer allows users to customize which KPI cards appear on the dashboard and in what order.

1. From the Workspace Insights dashboard, click the **Configure KPIs** (gear) button in the top right corner



In the **Configure KPIs** drawer

2. Use the toggles to show or hide KPI cards such as **Revenue**, **Supper**, or **Breakfast**
3. Drag and drop the KPI cards to reorder them so the most important metrics appear first
4. Click **X** to close the drawer
Changes are saved automatically.



Step 2: Benchmark Configuration

Benchmarks establish the targets that Insights uses to measure actual performance. These values are essential for meaningful comparisons and powering Schoolie’s AI analysis.

1. From the Workspace Insights dashboard, click the **Configure Benchmarks** (target) button in the top right corner

Workspace Acme School District

Insights Today All Schools

KPI	Value	Expected
Revenue	\$0.00	\$0.00
Supper	0%	0%
Breakfast	0%	0%
Lunch	0%	0%

2. Select the **Academic Year** from the dropdown
3. Enter benchmark values for each school across all KPIs:
 - Percentage-based KPIs (participation rates such as Breakfast, Lunch, Supper, Snack, Eco Dis): Enter the percentage target (e.g., 75%). Percentages support all timeframes.
 - Count-based or dollar amount KPIs (Revenue, Meals, MEQs, and Waste): Enter the expected daily value for a school (e.g., if you expect \$5,000 in revenue per day, enter “5000”)
4. Click **Save Changes** to apply benchmarks across the district

💡 Always enter daily expected values for Revenue, Meals, MEQs, and Waste to ensure that comparisons remain accurate across different time ranges.

Benchmark Configuration

Configure school-specific benchmark targets

Configure KPI Benchmarks Academic Year: 2025 - 2026

SCHOOL	Revenue	Supper	Breakfast	Lunch	Snack	Waste	Meals	Eco Dis	MEQs
Bellview Elementary	25	10	10	10	10	10	20	10	35
Champion Elementary	25	1	10	10	10	10	10	10	10
Cypress Elementary	30	10	30	40	0	10	10	0	10

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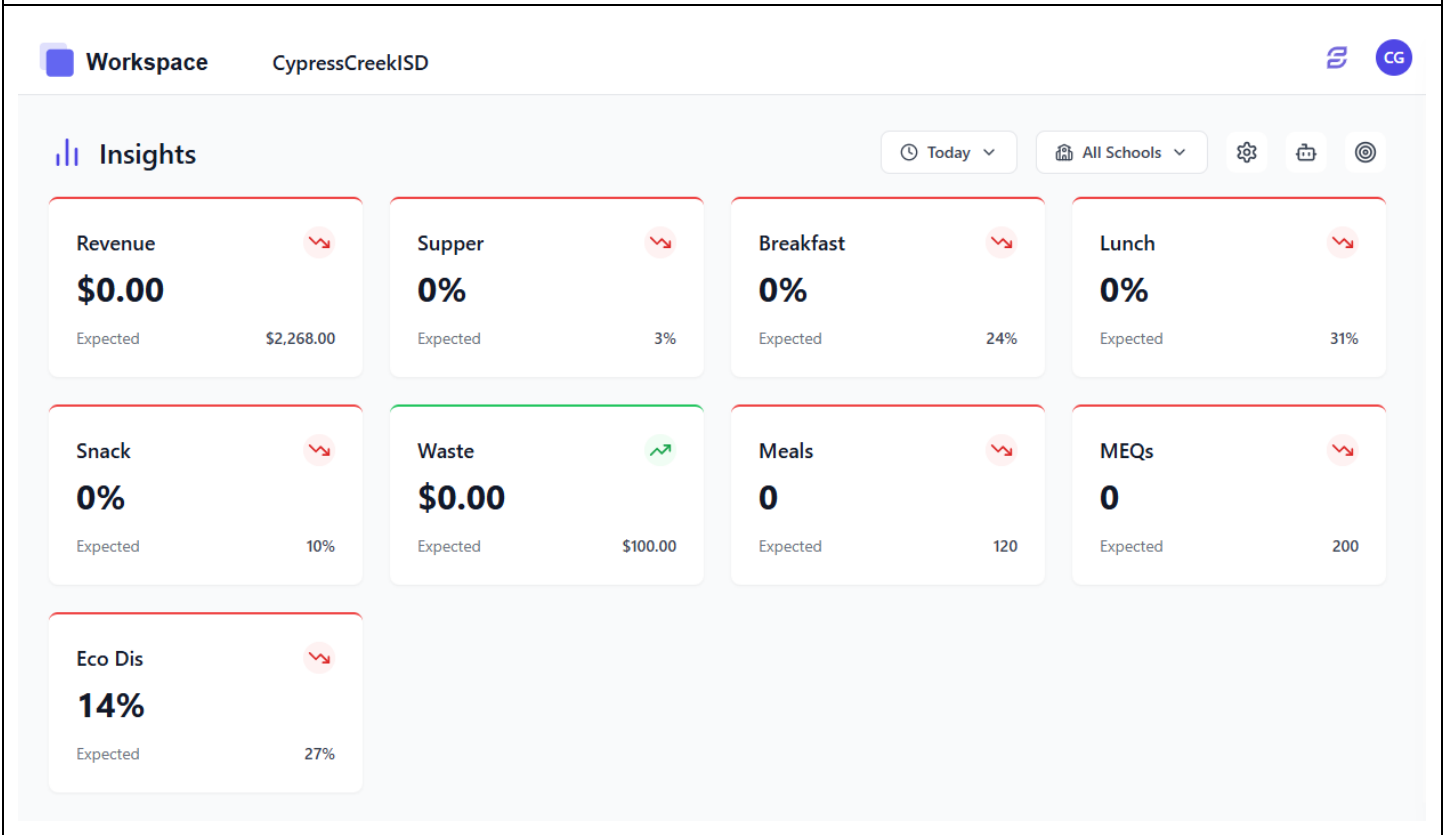
Save Changes

FEATURES

Key Metrics

The dashboard highlights the most important Key Performance Indicators (KPIs) for your Child Nutrition Program. Each KPI card shows actual vs. expected performance for quick benchmarking:

- Revenue – Total revenue compared to targets
- Supper – Average daily participation in supper meals
- Breakfast – Average daily participation in breakfast meals
- Lunch – Average daily participation in lunch meals
- Snack – Average daily participation in snacks
- Waste – Financial impact of wasted meals and items
- Meals – Total meals served across all programs
- Meal Equivalents (MEQs) – Standardized measure of overall meal participation
- Economically Disadvantaged (Eco Dis) – Participation among economically disadvantaged students



Click-Through Key Performance Indicators (KPI) Details

Each KPI card can be clicked to view a detailed breakdown of the numbers that make up the top-level metric. This click-through capability allows users to go beyond summary numbers and understand exactly what drives performance.

Revenue
✕

Analysis for Nov 5, 2025

Revenue Overview

Actual Revenue	Expected Revenue	Difference
\$0.00	\$2,268.00	-\$2,268.00 (-100.0%)

Meals

CATEGORY	REVENUE
Student (Free)	\$0.00
Student (Reduced)	\$0.00
Student (Paid)	\$0.00
Adult	\$0.00
Total Meals	\$0.00

A la Carte (ALC)

CATEGORY	REVENUE
Student Breakfast Items	\$0.00
Student Lunch Items	\$0.00
Student Snack Items	\$0.00
Student Supper Items	\$0.00
Student (Second Meal)	\$0.00
Adult Items	\$0.00
Total A La Carte	\$0.00

Other

CATEGORY	REVENUE
Tax	\$0.00
Additional Income	\$0.00
Total Other	\$0.00

About This Metric

📄 Total revenue from reimbursable meals and non-reimbursable sales.

Current and Historical Data

Insights allows users to analyze today's performance as well as historical data. By adjusting filters, users can review daily, weekly, monthly, or yearly results, ensuring they understand both immediate outcomes and long-term trends.

Workspace **CypressCreekISD**
CG

Insights

Today ^

All Schools v

Revenue

\$0.00

Expected \$2,268.00

Supper

0%

Expected 3%

Breakfast

0%

Expected

Snack

0%

Expected 10%

Waste

\$0.00

Expected \$100.00

Meals

0

Expected

Eco Dis

14%

Expected 27%

School Performance

Today

SCHOOL
ECO DIS
MEALS
MEQS
BREAKFAST
LU
REVENUE
WASTE

Today
November 05, 2025

Yesterday
November 04, 2025

This Week
Week of November 05

Last Week
Week of November 01

This Month
November 2025

Last Month
October 2025

Year to Date
2025 - 2026

Prior Year
2024 - 2025

SY 2023 - 2024
2023 - 2024

SY 2022 - 2023
2022 - 2023

SY 2021 - 2022
2021 - 2022

Custom Range
Select a custom date range

Flexible KPI Key Performance Indicators (KPI) Configuration

Every district is different, so Insights gives users control over how KPIs appear on the dashboard:

- Turn card visibility on/off – Choose which KPIs matter most for your district.
- Reorder cards – Drag and drop to display KPIs in the order you prefer.

This ensures that each user sees the metrics most relevant to their role and goals.

Configure KPIs
Customize your dashboard view

- Revenue Number
- Supper Number
- Breakfast Number
- Lunch Number
- Snack Number

Benchmark Configuration

To measure success effectively, Insights allows districts to set custom benchmarks for each KPI by school and year.

- Enter benchmark values for each KPI. Program access (Eco Dis) and participation KPIs utilize percentage benchmark values that cover all timeframes. Revenue, meal counts, MEQs, and Waste rely on establishing the daily expectation on the count or dollar amount.
- Configuring benchmarks by academic year to ensure benchmark expectations, color visualizations, and trend line analysis are provided on the dashboard.

By aligning KPIs with district targets, users can measure progress consistently across schools.

Benchmark Configuration
Configure school-specific benchmark targets

Configure KPI Benchmarks Academic Year: 2025 - 2026

SCHOOL	Revenue	Supper	Breakfast	Lunch	Snack	Waste	Meals	Eco Dis	MEQs
CypressCreekISD Elementary	25	1	10	10	10	10	10	10	10
CypressCreekISD High School	1978	1	10	10	10	10	10	49	25
CypressCreekISD Middle	20	1	30	40	10	10	10	0	25

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School Performance Comparison

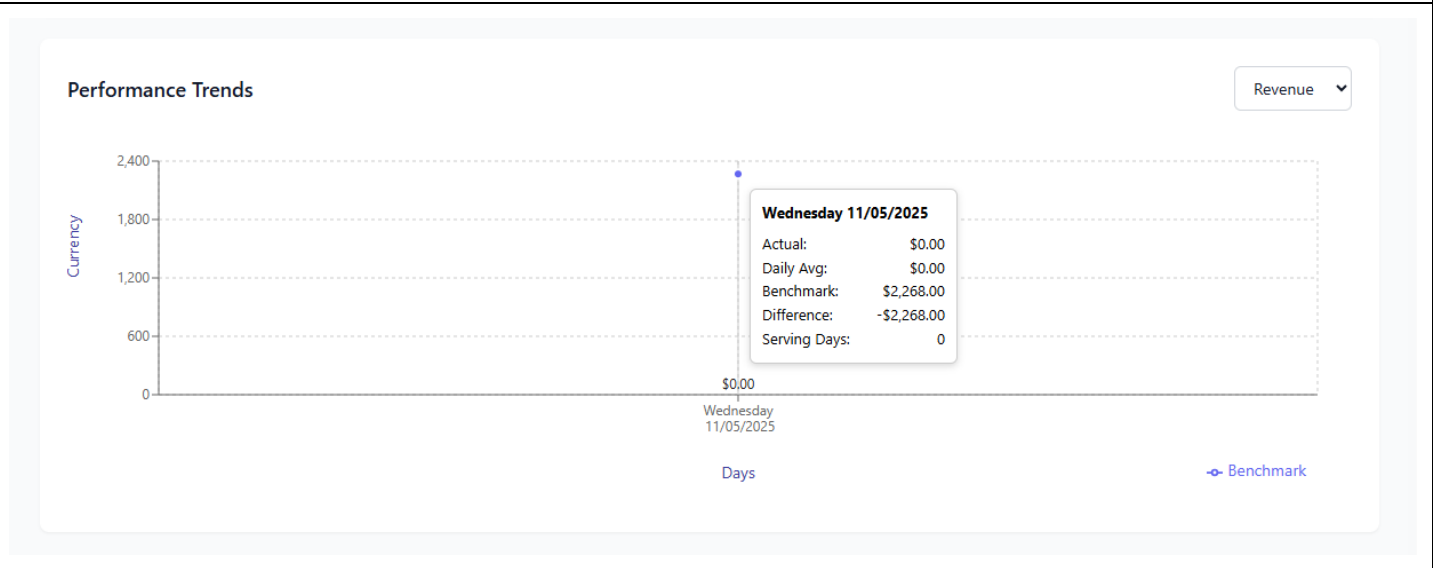
The School Performance table provides a list view of each school in your district, displaying the available KPIs for a quick overview of the numbers. Each value can be selected (like the KPI cards) to view detailed information for that KPI value. To access a particular school dashboard, utilize the school selector. School level staff with access to Insights will immediately see access to only their KPIs.

School Performance Today									
SCHOOL	ECO DIS	MEALS	MEQS	BREAKFAST	LUNCH	SNACK	SUPPER	REVENUE	WASTE
CypressCreekISD Elementary	50%	0	0	0%	0%	0%	0%	\$0.00	\$0.00
CypressCreekISD High School	0%	0	0	0%	0%	0%	0%	\$0.00	\$0.00
CypressCreekISD Middle	0%	0	0	0%	0%	0%	0%	\$0.00	\$0.00

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Performance Trends

Visualize performance over time with the Performance Trends chart. By selecting different KPIs, users can track patterns, evaluate program health, and spot long-term shifts in participation or revenue.



AI-Powered Insights with Schoolie

A unique feature of Workspace Insights is Schoolie, your built-in AI assistant. Schoolie automatically reviews KPI data, benchmarks results, and generates plain-language summaries of:

- What went well – Where performance aligns with goals and benchmarks.
- What needs improvement – Areas requiring attention, with clear recommendations.

With Schoolie, users don't just see the numbers — they also get actionable analysis to guide decisions and improve outcomes.

The screenshot displays the 'Schoolie Insights' interface for CypressCreekISD. On the left is a dashboard with KPI cards for Revenue (\$0.00), Supper (0%), Snack (0%), Waste (\$0.00), and Eco Dis (14%). On the right is a chat window with a message from Schoolie: 'Hi Charles ! I've analyzed the KPIs for all schools.' Below the message is an 'Assessment' section with a high-level summary and a list of 'What Needs Improvement' items, including Revenue, Supper Average Daily Participation (ADP), Breakfast Average Daily Participation (ADP), Lunch Average Daily Participation (ADP), Snack Average Daily Participation (ADP), Meals Served, Meal Equivalents (MEQs), and Economically Disadvantaged (EcoDis) Participation.

MENU ANALYSIS CALCULATIONS

Calculated Values:

1. Served Ratio: served count/produced count; 1-how?
2. Efficiency Ratio: Produced – Waste/produced count
3. Cost Efficiency: 1 – (Menu Item cost/cost per meal)
4. Preference Share: (served count/meal count) *(of Menu Items offered in this category)
5. Pairing Boost: Average of served ratio of the offered with option

Normalized Values:

1. Normalized Served Ratio:

$(\text{Served ratio value of row} - \text{min value of all served ratios}) / (\text{max value of all served ratios} - \text{Min value of all served ratios})$

2. Normalized Efficiency Ratio:

$(\text{Efficiency ratio value of row} - \text{min value of all Efficiency ratios}) / (\text{max value of all Efficiency ratio} - \text{Min value of all Efficiency ratios})$

3. Normalized Cost Efficiency:

$(\text{Cost Efficiency value of row} - \text{min value of all Cost Efficiency values}) / (\text{max value of all Cost Efficiency values} - \text{min value of all Cost Efficiency values})$

4. Normalized Preference Share:

$(\text{Preference share value of row} - \text{min value of all Preference share value}) / (\text{max value of all Preference share value} - \text{min value of all Preference share value})$

5. Normalized Pairing Boost:

$(\text{Pairing boost value of row} - \text{min value of all Pairing boost values}) / (\text{max value of all Pairing boost} - \text{min value of all Pairing boost})$

Score:

We can adjust the weights for each component. Currently, they are 25% for served, 20% for efficiency, 15% for cost, 25% for preference share, 15% for pairing options

Score =

- 0.25* Normalized Served ratio
- +0.20* Normalized Efficiency ratio
- +0.15* Normalized Cost Efficiency
- +0.25* Normalized Preference share
- +0.15* Normalized Pairing boost